

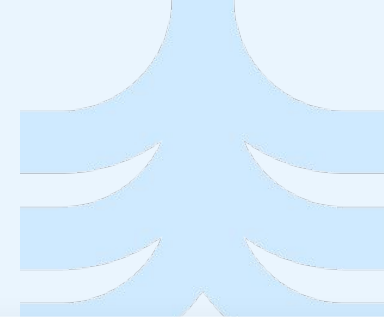
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Voice of the Insurance Broker

Digital FY25



Forward Looking Statements



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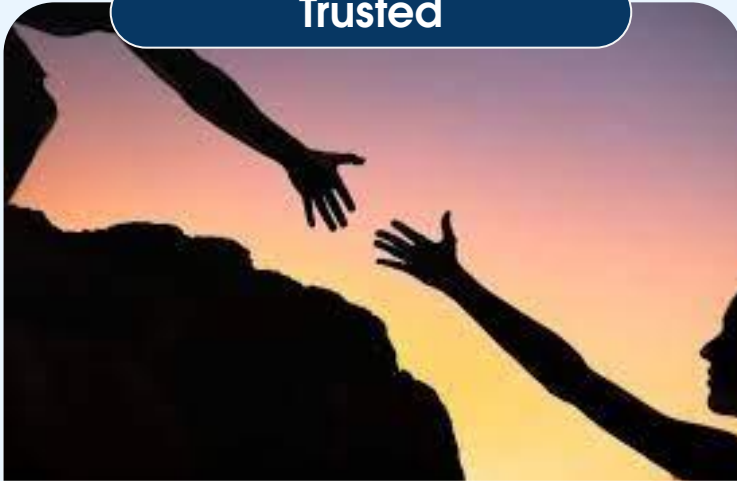
This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, results or outcomes could differ materially from those expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: our ability to meet the expectations of our customers; uncertainties regarding AI technologies and its integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including related to AI and Agentforce; our ability to execute our business plans; the pace of change and innovation in enterprise cloud computing services; and our ability to maintain and enhance our brands.

Marketing Cloud for Insurance Brokerages



Reimagining Policyholder Relationships

Trusted



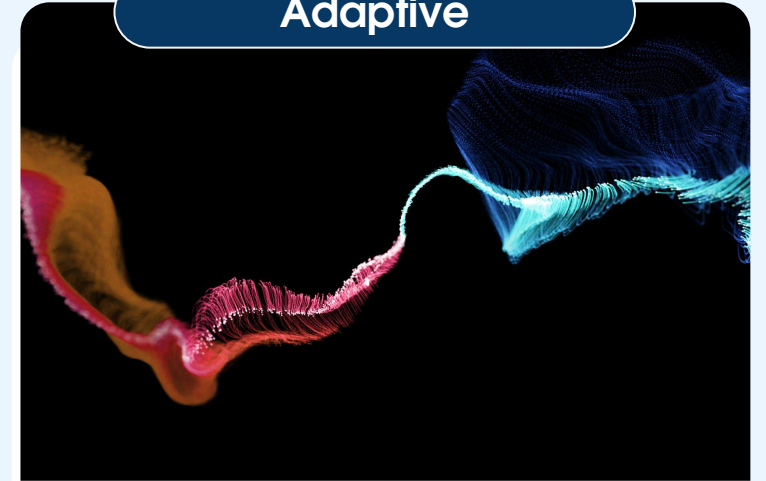
I gave you my data.
I have options.
Make me believe.

Personalized



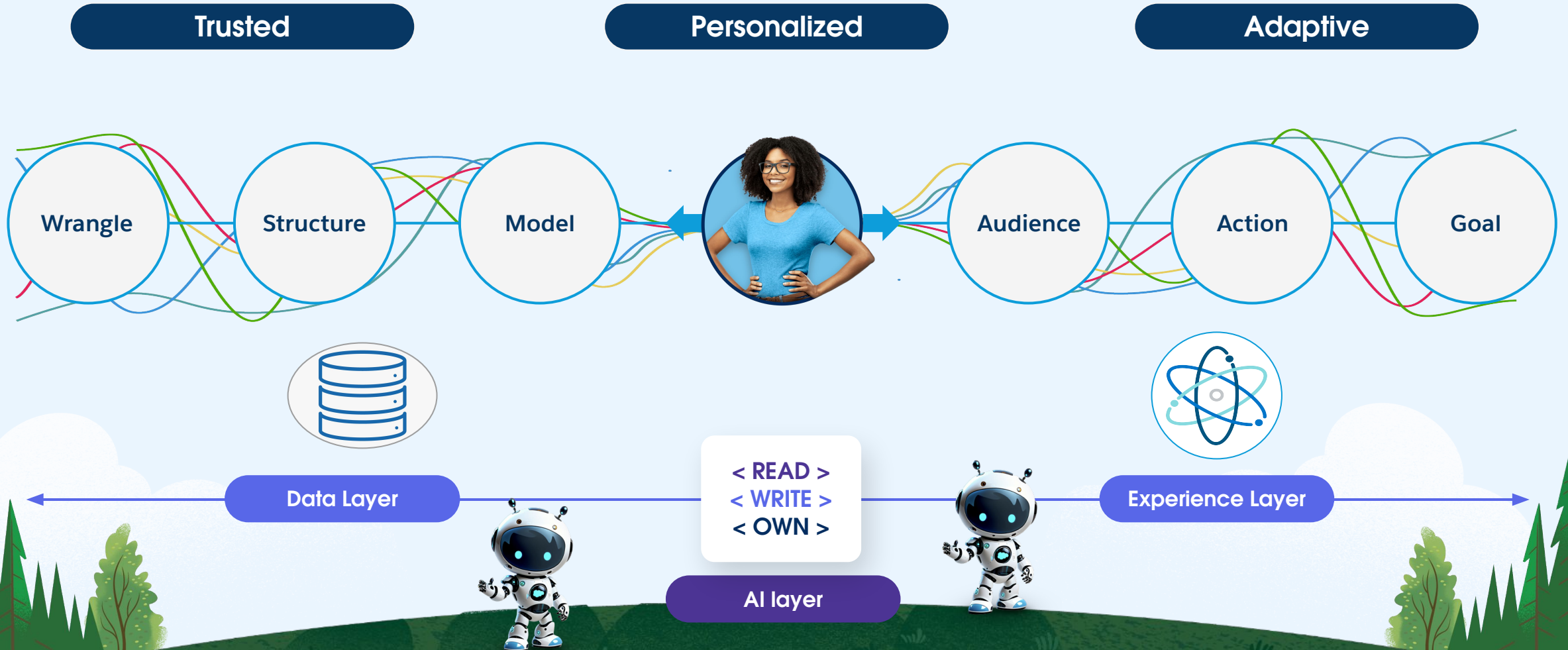
Relevance = context + agility.
Consistency is a superpower.

Adaptive



Things change.
I change.
Can you?

Embracing and activating customer centricity



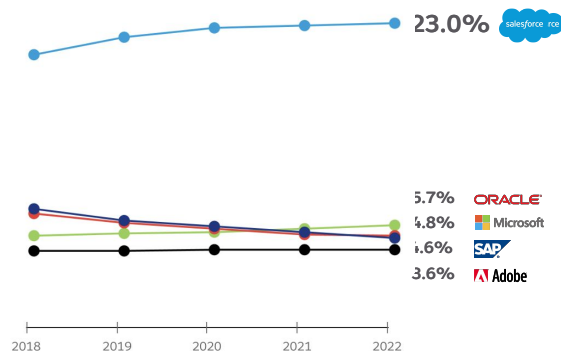
Platforms matter

Latency. Scale. Agility. Channels. Insight. Adoption.

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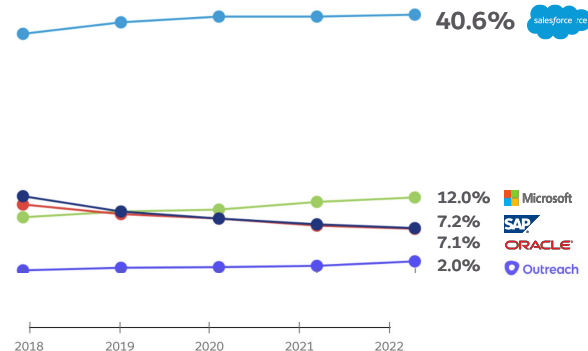
#1 in CRM

Ranked #1 for CRM Applications based on IDC 2022 Revenue Market Share Worldwide



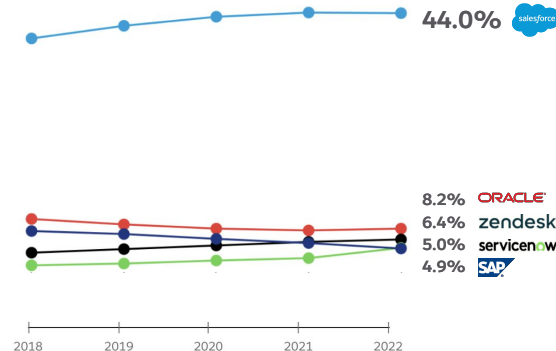
#1 in Sales

Ranked #1 for Sales Force Productivity and Management Applications based on IDC 2022 Revenue Market Share Worldwide.



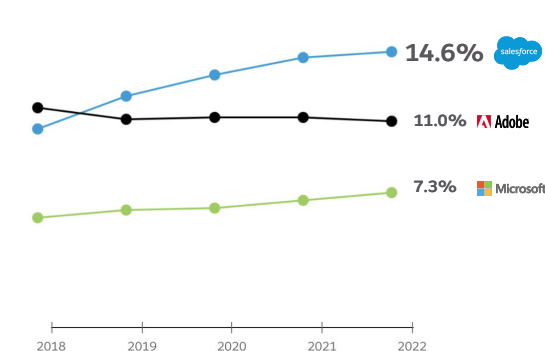
#1 in Customer Service

Ranked #1 for Customer Service Applications based on IDC 2022 Revenue Market Share Worldwide.



#1 in Marketing

Ranked #1 for Marketing Campaign Management **Applications** based on IDC 2022 Revenue Market Share Worldwide.



Source: IDC, Worldwide Semiannual Software Tracker, April 2023. CRM market includes the following IDC-defined functional markets: Sales Force Productivity and Management, Marketing Campaign Management, Customer Service, Contact Center, Advertising, and Digital Commerce Applications.

Moments are the atomic units of Customer Experience

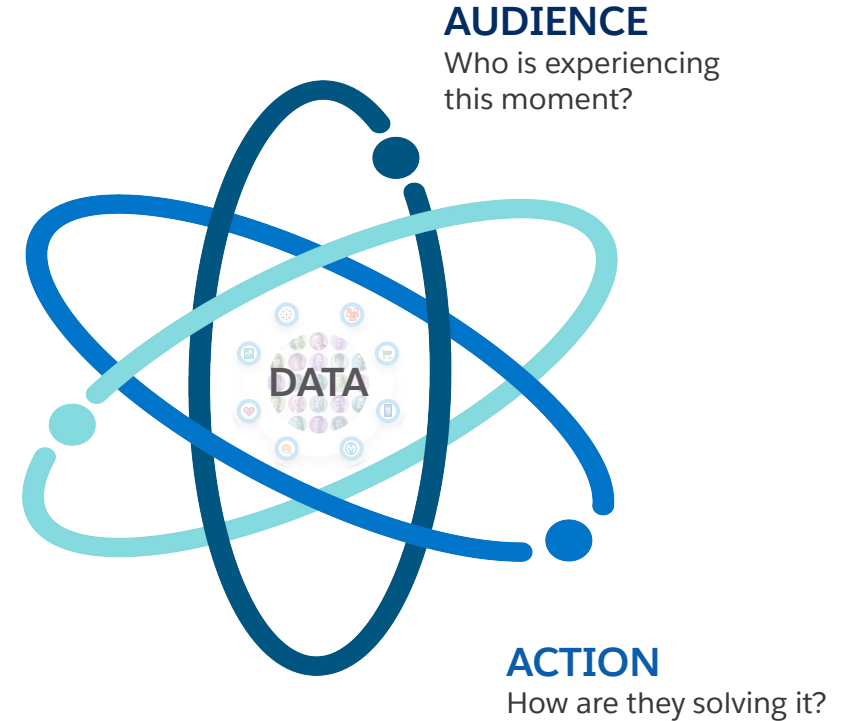
They are a **brief yet predictable** period in time.

Brands can **win and lose in the margins** of one experience.

Moments **Matter**.

GOAL

What's the intended measurable outcome?

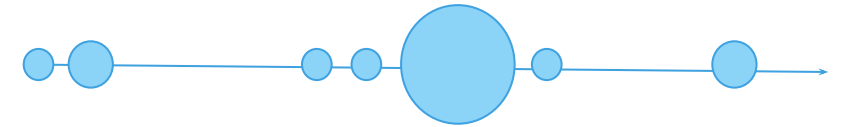
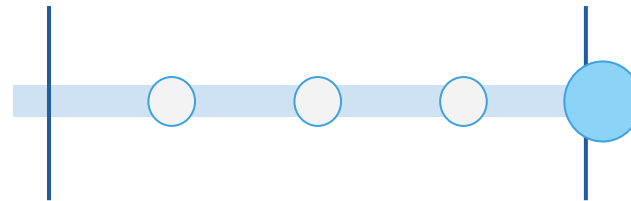
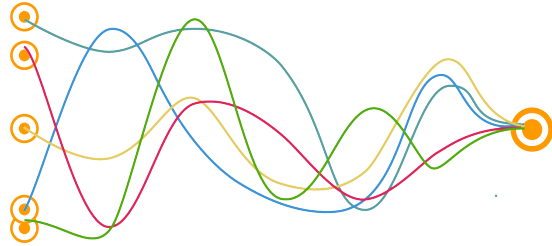


THREE ELEMENTS FOR IMPLEMENTING
A MOMENT-ORIENTED EXPERIENCE

Salesforce Marketing Cloud (Digital) + Platform powers CX



Every attribute change in a profile, be it resting or behavioral data is a Lead. How quickly do you respond?



ACTIONABLE DATA

BYO data lake & Open APIs

Native Cloud connections

Residency, Security & Views

Business Intelligence & Insights

UNIFIED IDENTITY

Operational customer profile

Preferences, Consent & Privacy

Engagement history

Real time behavior and intent

ENGAGE IN MOMENTS

Point and click segmentation

Omni-channel Journey orchestration

Email, Mobile, Web, Ads, FSC, Service

Next-best predictors (Einstein / AI)

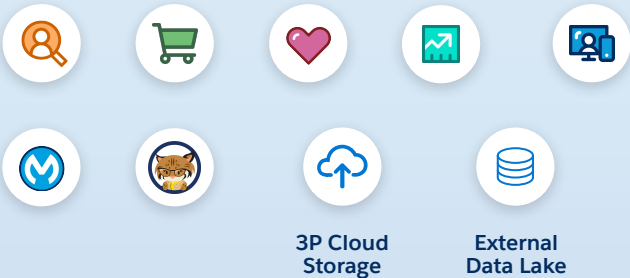
Marketing Cloud

Overview of our Digital Platform

Audience

Personalize Moments with Real-Time Data

 Data Cloud



Goal

Optimize Marketing Performance with AI

 Intelligence

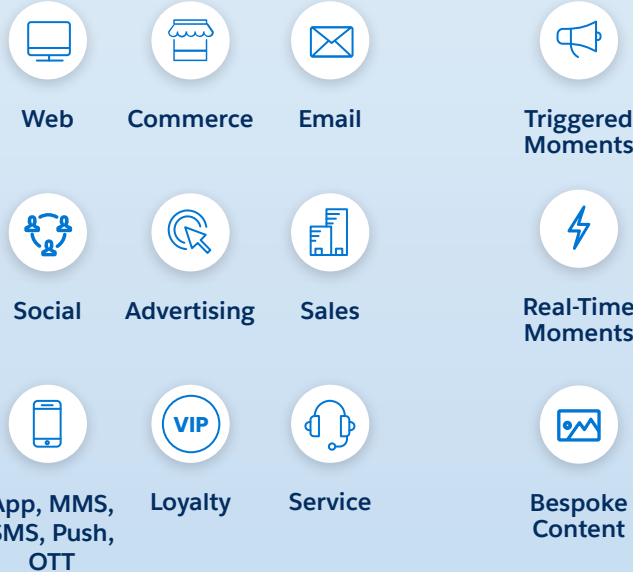


Action

Activate and Automate Engagement Across Channels

 Journey Orchestration

 Advanced Journey Personalization



Unlock Value Across the Policy Lifecycle

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Marketing & Contact

Personalize customer outreach and build deeper relationships with distribution partners



40% Increased Lead Conversion

Underwriting

Automate quote-to-issue and streamline underwriting to be your producers' preferred carrier



60% Reduction in Underwriting Time

Quote, Rate, Apply

Rapidly deploy digital quote-to-bind processes and dynamic digital experiences for customers, producers, underwriters, and other internal users



Service & Renewal

Increase agent/rep productivity and anticipate policyholder needs and propensity to renew

Claims

Give customers, agents, and adjusters real-time omni-channel access to claims info and processes.



80% Increased Customer Satisfaction/NPS

Agents for Insurance - Digital & CX

Key Use Cases

Business Process

Data Management Oversight

(i.e., Data integrity and availability)

Segmentation Strategy

(i.e., identify, recommend, optimize)

Journey Performance Analysis

(i.e., a/b/n testing, recommendations, optimization)

Real-Time Marketing Attribution

(i.e., Intraday analysis: channels, conversions, optimization)

Client Experience

Conversational Agent

(i.e., Lead generation; personalized bundling based on profile)

Onboarding

(i.e., 1:1 personalized real-time guidance for policyholders and employees)

Disaster Preparedness

(i.e., real-time recommendations)

Attrition

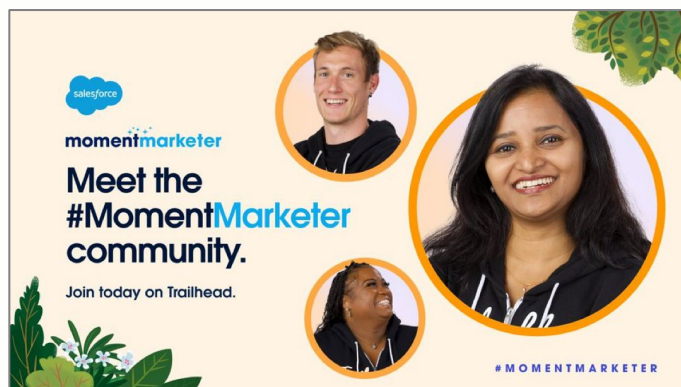
(i.e., pattern recognition and predictive intervention)

Want to learn more?



Learn about Moment Marketing

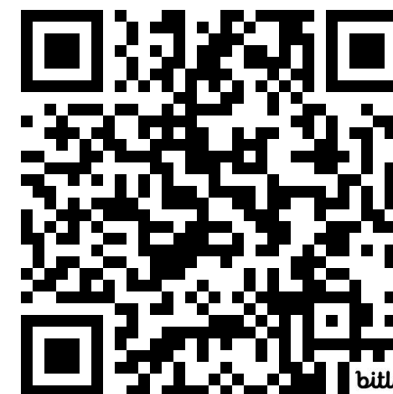
Check out the 31 days of Marketing Cloud on X, meet the #MomentMarketer community, learn through guided trails.



State of Marketing

Explore more insights in our latest report

2024, 9th edition



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Thank you

